

State of Washington

Department of Retirement Systems

Plan 3 Change of Investment Program

Department of Retirement Systems

PO Box 48380

Olympia, WA 98504-8380

Toll Free: 1-800-547-6657

Local: 360-664-7000

TDD: 360-586-5450

Return completed form to your employer

Section 1: Personal Data - To Be Completed by Member

____-____-____-____-____-____
Social Security Number

☐ PERS ☐ TRS ☐ SERS

Check your Retirement System

Last Name

First Name

Middle Name

Maiden Name

Section 2: Change of Investment Program - To Be Completed by Member

To obtain more detailed information about an investment program consult the Plan 3 Investment Guide. Investment guides are available from your employer or through ICMA-RC (1-888-711-8773).

Place a check mark in the box next to the investment program you choose.

- ☐ Washington State Investment Board (WSIB) Investment Program.
- ☐ Self-Directed Investment Program. You can select the allocation of your contributions by contacting ICMA Retirement Corporation (ICMA-RC) at 1-888-711-8773 or by accessing their Web site (<http://www.icmarc.org/plan3>).

Any contributions made prior to this change and the earnings generated by those funds will remain in the current investment program unless you request that they be transferred. To transfer fund balances between investment programs contact ICMA-RC toll-free at 1-888-711-8773 from 5:30 a.m. to 6:00 p.m. Pacific Time, Monday through Friday (on business days).

Employee Signature

Date

26 U.S.C. 6047(D), 6041(A), and 6109(A)(3) authorize DRS to solicit your Social Security Number.

- DRS uses your Social Security Number to ensure that any amounts disbursed under your account are properly reported to the Internal Revenue Service and as a reference number for tracking all data with regard to your retirement account.
- Routinely, DRS uses the Social Security Number as the identifying number for the member file.
- If you do not provide your Social Security Number, DRS cannot guarantee that the information you are providing on this form will be properly matched with your member records. This is a particular risk if your name is a fairly common one. Failure to provide your Social Security Number may also result in misreporting to the Internal Revenue Service any disbursements you receive, which may result in adverse tax consequences for you.
- Because this form affects how DRS reports your disbursements to the IRS, the disclosure of your Social Security Number to DRS is mandatory.
- DRS will not disclose your Social Security Number to any party unless required by law.